Micro-Tips for Project Managers

# Simple Excel Timelines on the run

MS Project, Monday, BaseCamp, LiquidPlanner and other tools are excellent but sometimes you need something quick to capture an idea and get a sense of sequence and timespans. Many of us have used Excel to draw a Gantt chart using a few shaded cells. Several years ago, I wanted something a little more automated and came up with a workbook I dubbed *QuickPlanner* that lets me keys in a list of items with date ranges and have Excel plot them out. I have found this little tool indispensable for all kinds of small tasks, such as plotting out travel itineraries, team leave planning and, yes, even project plans that do eventually end up in MS Project.

The QuickPlanner is not a feature-rich planning tool – it has no sense of resourcing or hierarchies. However, if you want something visual, it could do the trick. Features include:

* Unlocked, flexible and customizable
* Tabular data entry with extra columns for information
* Conditional formatting to draw bars
* Conditional formatting to show weekends and current date
* Data entry sheet with timelines on a day scale
* Linked sheets for week and monthly scale
* No macros or add-ins required; uses built-in Excel functions

You can add formulas in the date columns to create dependencies between start and end dates for different tasks.

Download QuickPlanner for free and have a play with QuickPlanner.

I invite you to share your thoughts and experiences using Excel for quick planning in the comments section. Together, we can refine our project management practices and drive success.

*As project managers, we employ various techniques and tools to streamline our work. While we are familiar with well-known methodologies like PRINCE2, PMBOK, SCRUM, SAFe, etc., our day-to-day activities often call for personalized planning, organization, documentation, review, and communication. In this post series, I will be sharing valuable tips and tools that have consistently proven effective throughout my career. I invite you to leave a comment, sharing your own experiences or suggestions, and contribute to the conversation.*

Substack link: https://graemerobertson.substack.com/p/pm-tools-2-quick-planner?sd=pf